Instructions for e-IDR

The Immediate Disclosure Reporting (e-IDR) Electronic Filing Program has been developed to provide more convenient filing options to Committees registered with the Bureau of Elections. In addition, the program provides faster and more accurate information to the public. The instructions below are provided to assist you with completing your online filing. These instructions can be used in conjunction with the instructional aids in the application. These instructional aids include:

- Help Function: As you go through the program/system/forms, you will find a "Help Button" to provide more information concerning using the application or how to complete the form based on the legal requirements.
- Mouse-Overs: Holding or hovering your mouse over long description fields opens an expansion of the field.
- Instructions on the pages: Throughout the application, the wording has been carefully designed to assist you in completing the forms.

Recommended Browsers and JAVA Script Enabled

The following are the recommended browsers for using the application. All users must have JAVA Script enabled on their chosen browser.

1. Internet Explorer 6.x or higher
2. Firefox 1.0.6 or higher
3. Netscape 7.x or higher

GETTING STARTED

To get started, from the Elections in Michigan Page, click on:
1. Campaign Finance Disclosure Page;
2. Electronic Filing and MERTS and
3. Immediate Disclosure Reports (e-IDR)

The first page you will see is the Committee Login page. See illustration and instructions below to complete the form.

Log-in ID#: Enter the Committee identification number assigned to you by the Bureau of Elections. You do not need to enter the dash and the digit following the dash.

If you do not have your identification number, contact the Bureau of Elections at 517-373-2540 for assistance.

Password: Enter the password assigned to the committee exactly as it was provided to you. If you need to request a password, click the "*Get/Reset Your Password" button to the right.

The following page will appear.

Email: Enter the email address where you should receive confirmation of your filing and a copy of the filing submitted to the Bureau of Elections.

Re-enter Email: Re-enter the email address. Both Email fields must match exactly for you to continue.

Click the "Assign It" button to complete the password request. An email will be sent immediately to the email address provided. Note: You will need to close or minimize the application to access your email and then return to the e-IDR program.

Click the "Clear" Button only if you need to clear all of the fields.

Click the "Login" Button to continue into the e-IDR program.

If any of the information in the Login page is incorrect, you will be given an opportunity to correct the information. A window will appear that explains the error. You can then correct the information.

SELECT THE REPORT TO BE FILED

After successfully entering the login information, you will proceed to a page to select the type of report to be filed.

The Committee ID#: Displayed for your information and confirmation.
Committee Name: Displayed for your information and confirmation.

Abort the session, by closing the browser, and contact the Bureau of Elections at 517-373-2540 if you believe you accessed the incorrect filer information.

To file an **new** report:

Report Date: Enter the date that the contributions or expenditures were received or made by the committee filing the report. The committee receives a contribution as soon as the committee treasurer or an agent designated by the treasurer receives it.

Report Type: Select the proper report type.

Click the "Create New Report" button to proceed.

OR

To amend an **existing** report:

Select the report from the list to proceed.

ENTER THE REPORT INFORMATION
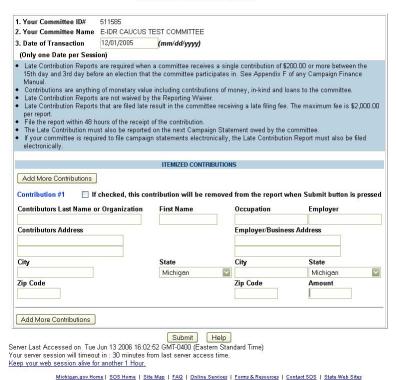
1. Late Contribution Report
2. Special Election Independent Expenditure Report
3. 24-Hour Expenditure Report
4. 24-Hour Contribution Report

1. Late Contribution Report

Items 1., 2., 3. are pre-filled based on the information provided in the previous screens.

<u>Entering Fields</u>:

Contributors Last Name or Organization: Enter the Last Name of the contributor or the Organization name if the contributor is not an individual.
First Name: If the contributor is an individual, enter their First Name.
Contributors Address: Enter the contributor's address.
City: Enter the contributor's city.
State: Enter the contributor's state.
Zip Code: Enter the contributor's zipcode.
Occupation: If the contributor is an individual, enter the occupation of the contributor. Note Self Employed is not an occupation.
Employer: If the contributor is an individual, enter the employer of the contributor.
Employer/Business Address: If the contributor is an individual, enter the address of the contributor's employer or business address.
City: If the contributor is an individual, enter the city of the contributor's employer or business address.
State: If the contributor is an individual, enter the state of the contributor's employer or business address.
Zip Code: If the contributor is an individual, enter the address of the zip code employer or business address.
Amount: Enter the Amount of the Contribution

<u>Check Boxes or Buttons</u>:

Mark the "**If, checked this contribution will be removed from the report when Submit button is pressed"** to remove a transaction.

Click the "**Add More Contributions**" to continue adding transactions into the form for the date listed in Item #3.

Click the "**Help**" Button for on-screen help features.

Click the "**Submit**" Button when the form is ready to submit. This will allow you to proceed to a submission verification screen. If there are any issues with the filing, the system will display a message indicating which items need to be corrected.

Click the "**Keep your web session alive for another 1 Hour**" if your session will take more than 30 minutes. Note if the session is lost before you complete the "submit" process, the data entered will be lost.

2. Special Election Independent Expenditure Report

Items 1., 2., 3. are pre-filled based on the information provided in the previous screens.

Entering Fields:
Recipients Last Name or Organization: Enter the Last Name of the recipient or the Organization name if the recipient is not an individual.
First Name: If the recipient is an individual, enter their First Name.
Recipients Address: Enter the recipient's address.
City: Enter the recipient's city.
State: Enter the recipient's state.
Zip Code: Enter the recipient's zip code.
Candidate Last Name: If the recipient is a candidate committee, enter the candidate's last name.
First Name: If the recipient is a candidate committee, enter the candidate's first name.
Office/District Sought: If the recipient is a candidate committee, enter the candidate's office sought and district information; for example State Representative, 1st District.
County of Residence: If the recipient is a candidate committee, enter the candidate's county of residence.
Ballot Question: If the recipient is a ballot question committee, enter the name of the proposal
Exp. Type: Defaults to Independent

Supp/Opp: Defaults to Support. Select Oppose if the expenditures is to oppose the recipient committee.
Amount: Enter the Amount of the Expenditure

Check Boxes or Buttons:

Mark the "**If, checked this contribution will be removed from the report when Submit button is pressed"** to remove a transaction.

Click the "**Add More Expenditures**" to continue adding transactions into the form for the date listed in Item #3.

Click the "**Help**" Button for on-screen help features.

Click the "**Submit**" Button when the form is ready to submit. This will allow you to proceed to a submission verification screen. If there are any issues with the filing, the system will display a message indicating which items need to be corrected.

Click the "**Keep your web session alive for another 1 Hour**" if your session will take more than 30 minutes. Note if the session is lost before you complete the "submit" process, the data entered will be lost.

3. 24-Hour Expenditure Report

Items 1., 2., 3. are pre-filled based on the information provided in the previous screens.

CAMPAIGN FINANCE
Electronic Filing

24 HOUR EXPENDITURE REPORT

1. Your Committee ID# 511585
2. Your Committee Name E-IDR CAUCUS TEST COMMITTEE
3. Date of Transaction 05/01/2006 *(mm/dd/yyyy)*
(Only one Date per Session)

- 24 Hour Expenditure Reports are required when a caucus committee makes a single expenditure of more than $1000 from the 14th day preceding an election to the day after the election.
- Expenditure is defined in Section 6 of the Campaign Finance Act.
- 24 Hour Expenditure Reports are not waived by the Reporting Waiver.
- 24 Hour Expenditure Reports that are filed late result in the committee receiving a late filing fee. The maximum fee is $1000 per report.
- 24 Hour Expenditure Reports must be filed electronically within 24 hours of making the expenditure.
- Expenditures reported on the 24 Hour Expenditure Report must also be reported on the next Campaign Statement owed by the committee.
- If your committee is required to file campaign statements electronically, the 24 Hour Expenditure Report must also be filed electronically.

ITEMIZED EXPENDITURES

[Add More Expenditures]

Expenditure #1 ☐ If checked, this expenditure will be removed from the report when Submit button is pressed

Recipients Last Name or Committee **First Name** **Candidate Last Name (if applicable)** **First Name**

Recipients Address **Office/District Sought** **County of Residence**

Ballot Question

City **State** Michigan
Exp. Type Direct **Supp/Opp** Support **Amount**

Zip Code

[Add More Expenditures]

[Submit] [Help]

Server Last Accessed on Mon Jul 03 2006 09:41:29 GMT-0400 (Eastern Standard Time)
Your server session will timeout in : 30 minutes from last server access time.
Keep your web session alive for another 1 Hour.

<u>Entering Fields</u>:

Recipients Last Name or Organization: Enter the Last Name of the recipient or the Organization name if the recipient is not an individual.
First Name: If the recipient is an individual, enter their First Name.
Recipients Address: Enter the recipient's address.
City: Enter the recipient's city.
State: Enter the recipient's state.
Zip Code: Enter the recipient's zip code.
Candidate Last Name: If the recipient is a candidate committee, enter the candidate's last name.
First Name: If the recipient is a candidate committee, enter the candidate's first name.
Office/District Sought: If the recipient is a candidate committee, enter the candidate's office sought and district information; for example State Representative, 1st District.
County of Residence: If the recipient is a candidate committee, enter the candidate's county of residence.
Ballot Question: If the recipient is a ballot question committee, enter the name of the proposal
Exp. Type: Defaults to Independent
Supp/Opp: Defaults to Support. Select Oppose if the expenditures is to oppose the recipient committee.
Amount: Enter the Amount of the Expenditure

<u>Check Boxes or Buttons</u>:

Mark the "**If, checked this contribution will be removed from the report when Submit button is pressed"** to remove a transaction.

Click the "**Add More Expenditures**" to continue adding transactions into the form for the date listed in Item #3.

Click the "**Help**" Button for on-screen help features.

Click the "**Submit**" Button when the form is ready to submit. This will allow you to proceed to a submission verification screen. If there are any issues with the filing, the system will display a message indicating which items need to be corrected.

Click the "**Keep your web session alive for another 1 Hour**" if your session will take more than 30 minutes. Note if the session is lost before you complete the "submit" process, the data entered will be lost.

4. 24-Hour Contribution Report

Items 1., 2., 3. are pre-filled based on the information provided in the previous screens.

Entering Fields:

Contributors Last Name or Organization: Enter the Last Name of the contributor or the Organization name if the contributor is not an individual.

First Name: If the contributor is an individual, enter their First Name.

Contributors Address: Enter the contributor's address.

City: Enter the contributor's city.

State: Enter the contributor's state.

Zip Code: Enter the contributor's zipcode.

Occupation: If the contributor is an individual, enter the occupation of the contributor. Note Self Employed is not an occupation.

Employer: If the contributor is an individual, enter the employer of the contributor.

Employer/Business Address: If the contributor is an individual, enter the address of the contributor's employer or business address.

City: If the contributor is an individual, enter the city of the contributor's employer or business address.

State: If the contributor is an individual, enter the state of the contributor's employer or business address.

Zip Code: If the contributor is an individual, enter the address of the zip code employer or business address.

Amount: Enter the Amount of the Contribution

Check Boxes or Buttons:

Mark the "**If, checked this contribution will be removed from the report when Submit button is pressed"** to remove a transaction.

Click the "**Add More Contributions**" to continue adding transactions into the form for the date listed in Item #3.

Click the "**Help**" Button for on-screen help features.

Click the "**Submit**" Button when the form is ready to submit. This will allow you to proceed to a submission verification screen. If there are any issues with the filing, the system will display a message indicating which items need to be corrected.

Click the "**Keep your web session alive for another 1 Hour**" if your session will take more than 30 minutes. Note if the session is lost before you complete the "submit" process, the data entered will be lost.

RE-ENTER PASSWORD FOR SECURITY

Password: Enter the password assigned to the registrant exactly as it was provided to you.

To go back to correct or double-check the form, click the "Return To Form" Button

To submit the report, click the "Submit Report" Button.

SUBMIT LATE CONTRIBUTION REPORT: RE-ENTER PASSWORD FOR SECURITY	
Committee Name :	E-IDR CAUCUS TEST COMMITTEE
Committee ID# :	511585
Password :	

Submit Report   Return To Form

An online screen will appear to inform you that your filing has been received. The document sequence number is also displayed.

An email message with a copy of the Report attached will be sent to the email address used in the Login process.